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Employers are welcome to use the text of this announcement in employee newsletters.

Annual Member Statement Coming Soon

Statement will help members plan for retirement

Beginning in late April, PERF will mail its first-ever Annual Member Statement to more than 200,000 members. The mailing is expected to be complete by the end of June.

This new statement will provide members with PERF's record of their wages and service, as reported by employers. In addition, the statement will provide an estimate of a potential benefit for any member with at least five years of creditable service. The benefit calculation only estimates a projected pension benefit, the larger portion of the two-part PERF benefit, and does not include the Annuity Savings Account (ASA). (Members receive quarterly ASA statements.)

Once members receive this statement, they should review all the personal information provided for accuracy. To correct information on the statement, members should contact PERF at questions@perf.in.gov or call us, toll-free, at (888) 526-1687.

"For the first time in PERF history, this Annual Member Statement will provide PERF wage and service information for our members," said Executive Director David Adams. "This will be a helpful preliminary tool in our members' retirement planning."

Employment records are essential to the accuracy of PERF's retirement benefits. PERF, employers and members share responsibility in keeping account information accurate, including employment history, beneficiary information and personal addresses.

Questions & Answers

For Members and Employers

Q. What is the Annual Member Statement?

A. For the first time in PERF's history, an account statement listing a year-by-year service and wage history will be mailed to PERF members. This statement is comparable to what you periodically receive from the Social Security Administration. For members with at least five years of creditable service, this statement will also include an estimated pension benefit.

Q: Who will receive this statement?

A: Active PERF members will receive this statement as well as inactive PERF members with at least eight years of creditable service. This statement will not go to members of non-PERF funds.

Q. When will PERF members receive these statements?

A. PERF will begin mailing the Annual Member Statements in April and continue to send them through June.

Q. My friend received a statement and I did not. What should I do?

A. Just wait; you should receive your statement soon. We are mailing these statements incrementally from April to June, so some members will receive it in April, while others will get theirs in June.

Q. How often will this statement be mailed?

A. PERF will mail this statement every year.

Q. What should I do with my statement?

A. Review all the personal information on your statement. If you need to correct information or have other questions, please email PERF at questions@perf.in.gov or call us, toll-free, at (888) 526-1687.

Q. What should I do if my service or wage data is not what I expected?

A. Please email PERF at questions@perf.in.gov or call us, toll-free, at (888) 526-1687.

Q. If my beneficiary information is inaccurate, how can I correct it?

A. To update your beneficiaries instantly, go to www.perf.in.gov and log in to PERF Online. If you do not have a password, the site provides instructions on how to set one. You can also download, print and complete the ASA Change of Beneficiary form and then mail or fax it to PERF.

Q. What is the "Your Estimated Benefit" section?

A. If you have at least five years of creditable service, this section estimates what your pension benefit could possibly be. The calculation shows your projected pension benefit using the Five Year Guaranteed Benefit Option (Option 10), just one of the several pension options available. Also, this estimated benefit does NOT include your Annuity Savings Account (ASA) balance.

Q. Why do some statements include a section called "Your Estimated Benefit," while others do not?

A. This section will only appear on your Annual Member Statement if you have at least five years of creditable service with the fund.

Q. What should I do with the information listed under "Your Estimated

Benefit?"

A. You should use this information as a preliminary retirement planning tool. It is an unofficial estimate.

Q. How can I get a benefit estimate that includes my ASA balance and shows more of the available pension options?

A. To obtain a more thorough benefit estimate, please log in to PERF Online at www.perf.in.gov. Like the Annual Member Statement, this online benefit estimate calculator uses your actual account data and is an unofficial estimate.

Q. How do I determine if I'm ready to retire?

A. Retirement is a major life change and there are many things you should consider before making this decision. PERF's [Bridge to Retirement](#) will help you decide if you're ready and, if you are, outline the steps involved in PERF's retirement process. Go to www.perf.in.gov and download a copy of this helpful brochure or call us, toll-free, at (888) 526-1687 to request one.

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